



## Contacts View

The screenshot displays the Siebel Contacts View interface. The top section, titled 'Account', contains several input fields for account information. The 'Account Information' section includes fields for Last Name (Chase), First Name (Timothy), and Suffix (Nil). The 'Phone Numbers' section includes fields for Country Code, Home (617.250.1005), Work, Fax, and Mobile. The 'Availability' section includes fields for Hours, Tmzn, and Method. The bottom section, titled 'Contacts', displays a list of contacts. The list has columns for Contact Type, Relationship/Title, Account, First Name, Last Name, Suffix, and M. The first contact is a Customer with the relationship of Broker, associated with account 000-74-2020, with first name Timothy and last name Chase. A sidebar on the left contains navigation links for My Accounts, My Team's Accounts, All Accounts, Activities, Attachments, Cases, Contacts, Loans, Results, Notes, Partners, and Chats. The bottom status bar indicates 'Items: 8 of 10+'.

### **View Description:**

This view provides an easy method of entering a contact for an account, updating/performing existing contacts, and listing all contacts associated with an account.

#### **OCTS Account Form Applet (toggled):** *top half of view*

The form applet displays all pertinent account information for a given account in a single, scroll-free display. This applet has a toggle feature that switches between the two halves of the OCTS Account Entry Applet to enable the user to see all of the account data..

For a detailed data mapping please refer to Appendix B-6

#### **OCTS Contact List Applet:** *bottom half of view*

The list applet allows the user to scroll through a list of all contacts, or to select a subset of contacts to view by using the query feature. To facilitate efficient work on a contact, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed account or activity information

For a detailed data mapping please refer to Appendix B-7

